

Reverse Trade Mission Lessons Learned

Elements of a Successful Reverse Trade Mission

Compiled by:

Gladstein & Associates, contractors to the Department of Energy Clean Cities Program
Organizers of the Department of Energy Alternative Fuels Trade Mission to Mexico in April 2002 and the
Clean Cities Mexico Reverse Trade Mission in November 2002

Recruitment

1. ***Specialized trade associations or organized groups proved to be good sources of contacts for potential participants.*** In this case, trucking associations, unions, governmental agencies, and other groups with environmental sectors or concerns were willing to help and provided suggestions on and contact information for more target fleets based on their knowledge of the area. Those fleets contacted through these groups showed high interest in this sort of project. Using national environmental agencies or groups located outside the target area can also be useful. Three such agencies in Mexico City, la Asociación de Transportistas Mexicanas, Comisión Nacional para el Ahorro de Energía (CONAE), and the Undersecretary of International Commerce in Nuevo Leon, provided suggestions for fleet contacts in the Nuevo Laredo area.
2. ***A free ride is not enough.*** Simply offering the Mexican companies a free trip to Texas was not enough to get a commitment. Approximately ten Mexican fleet officials committed to attending at no cost but did not follow through with agenda logistics in the days before the conference. Allow for such attrition. Mexican companies can be suspicious of such an offer, and often do not give a direct yes or no answer for attendance confirmation. Many times persons will request information, seem interested, and then never respond to invitations, which leads to the third point.
3. ***Persistence and creative recruiting are key.*** Companies can often have one email account for several users, and the one office fax machine serves 100 employees. Utilize all forms of communication: phone, fax, and email. Remember, the postal system in Mexico may take up to six months. Send invitations out several times with different headings, slightly different wording, and even varying styles such as formal letter, creative, colorful invitations, messages with catchy headings, etc. Especially since the personnel do not know the recruiter, several attempts are necessary to capture the correct person's attention. Because Mexicans value personal contact, phone calls are imperative and are often the best way to ensure a person responds. Business is much more drawn out in Mexico. Begin contact attempts roughly 1.5 to 2 months before the event.
4. ***Be prepared for unforeseen circumstances,*** even after thorough confirmations and planning. After flight confirmations and a phone conversation, two of the participants chose not to use airline ticket and instead chose to drive.
5. ***Expect procrastination.*** Though most participants had been contacted and given flight choices two weeks before the event, it was not until Friday afternoon before the event week that all flights had been chosen and could be booked. This may present a problem for ticket distribution. Check with the airline to make sure they can send e-tickets for the incoming flights; Continental does. American, however, does not, so it is necessary to arrange for postal delivery of these tickets. If paying for the flights, it may be better to

assign flights to participants rather than allowing them to choose. This would allow for earlier planning and cheaper airfare.

Event Coordination

6. ***Insure conference presenters are well prepared and understand the purpose of the Trade Mission.*** During two presentations, participants were lead off-track by answers and statements that seemed to conflict with earlier communication. One agency provided a speaker who was a repair technician, and therefore familiar with the mechanics of their AFVs. Although his technical expertise from hands-on vehicle experience was helpful, the speaker did not realize the conference goal was to promote these clean technologies. Later it was discovered that this man had been chosen to speak because of his experience with Spanish, but he lacked the perspective needed to provide a complete picture of the agency's alternative fuel experience. By dwelling on the problems encountered, which were typical of the learning curve in a new technology, he excluded many of the positive results of the switch from diesel to CNG. Do not leave out the difficulties associated with alternative fuels, but continue to focus on how a company overcame them and the benefits conferred by the switch.
7. ***Have Spanish speakers lined up for every presentation.*** Include someone in the group who understands both Spanish and English and will help explain or translate when necessary. This becomes important in all situations, from hotel check out to understanding a menu. As illustrated by the previous example, insure this person is familiarized with the conference purpose. Even those participants who spoke a bit of English got lost during technical explanations of engines. Participants in this case can miss crucial points that answer their questions. Hired translators often lack technical vocabulary and draw out information sessions because of the communication gap. Texas proved an excellent location for a Mexican Reverse Trade Mission because of its abundance of Spanish speakers and proximity to Mexico. Restaurants and informal locations all tended to have Spanish speakers on hand, but do not count on this. Also having Spanish versions of handouts and literature is recommended as a courteous gesture to the invitees.
8. ***An interactive yet structured format works best.*** At each site visit, companies had a presentation prepared with explanations of what everyone would later see and an industry perspective. Roundtable discussions were fairly informal, and questions arose in response to several issues, such as maintenance and refueling. Allow time for this type of problem/solution brainstorming session, which can bring answers through the shared experience or knowledge of each representative. Seeing the vehicles and engines was also important for participants, who could better understand natural gas technology after studying a vehicle's internal structure. In particular, Mexican culture values seeing and touching over audio experience. By spending more time with the vehicles and questions and less in a formal presentation, conference organizers make the most of their time.
9. ***Include a variety of AFV applications and aspects.*** This Trade Mission visited a station builder/fuel provider, an independent LNG delivery fleet, a state-controlled CNG bus fleet, the training grounds for AFV-certified mechanics, a warehouse FuelMaker application, and a wide range of CNG vehicles used in an International airport. This

diversity of experience not only keeps the days interesting, but it also provides extensive backing for the widespread use of natural gas in vehicles. Participants from any country can relate to airport vehicles, city buses, etc.

10. **Remember the K.I.S.S principle: Keep it Short and Simple.** Invitees were more inclined to attend the Trade Mission once it was shortened from five days to three. Otherwise people miss an entire workweek and have difficulty justifying this. Keeping a day's activities limited also focuses attention.
11. **Remember that this may be participants' first visit to the United States.** Leave an afternoon and evening open for tourism activities that can be easily organized. Also keep in mind that Mexican business activities involve a significant amount of socializing and conversation outside business. Remember not to talk all facts and business during lunches and car rides. Making a personal connection is crucial for future business contacts.
12. **Mexicans have a different work and eating schedule.** While breakfast is usually a large meal, lunch is lighter. Breakfast occurs around 8:30 and lasts about an hour, and lunch is eaten around 3:00 pm. Remember this when coordinating meal times. Do not expect to start every day at 7:00 am; participants will not be nearly as receptive or prepared at such hours! Also notify attendees that they are welcome to have alcohol at a meal, but due to government restrictions, they must pay for it themselves. Double check every bill to ensure no alcohol was included by mistake.
13. **Prepare handouts on weather and packing.** Delegates will want to know what to pack, what to have in a carryon, general weather conditions, how much money to bring, and how to call home from the United States. Remind them of U.S. new flight requirements for sharp objects and official identification. Distribute a handout beforehand with all this information, and be sure to include emergency contact information, such as cell phones or other office personnel's numbers.
14. **Use AFVs for transportation.** During this mission, conference attendees rode in a 15-passenger van and 4 door sedans that ran on CNG. This is a perfect opportunity to show off vehicle features during the ride. Provide opportunities for attendees to participate in vehicle fueling. Alternative Fuel Vehicle manufacturers will usually loan out such vehicles for this type of event.
15. **If possible, arrange for dedicated drivers.** Perhaps the vehicle manufacturers could donate personnel for a few hours. Having environmental officials who know the city might also be an option. Conference organizers, not dedicated drivers, had this responsibility during the Reverse Trade Mission. Organizing a train of vehicles going from site to site and figuring out/following directions in unfamiliar cities can consume a great deal of time, which could be better spent with attendees.
16. **Think through all logistical details before the Trade Mission.** Go through each Trade Mission day mentally before the conference begins. Know the order of the day, where all sites are located, where nearby restaurants are, what time range for departures/arrivals are necessary, and how to transport participants to all destinations. Don't forget parking; for those sites in or near downtown, this often presents an issue. Call site personnel beforehand to get specific advice on where to park upon arrival. Meticulously planning a timeline for each day helps tremendously. Use an online map service to have detailed directions on hand for every leg of a day's journey. Downtown hotels were chosen for this Trade Mission. This offers the dual advantage of group rates and accommodations

plus easy access to restaurants and any evening activities invitees wished to engage in. In Houston, the hotel had a complimentary shuttle, and in Dallas the DART rail, which also runs on natural gas, was only a few steps away from the hotel.

17. ***Have one person assigned to note-taking at all events.*** This person should also note points of controversy, questions, and issues that should be followed up on after the conference week. Provide notes and pertinent action items to all participants in both Spanish and English. These documents can then be given to other company employees, especially decision-makers, as a way to learn from the participant's experience.